

Local Account Administrators

DLS Gateway allows your community's finance and executive officials to enter, review, submit, and check approval status on valuation, tax rate, and accounting processes overseen by the Department of Revenue.

Only officials with login accounts can access this information or perform these on-line functions. DLS has already created accounts for certain key officials, one for each department, to initiate data submission for FY2009: one account in the assessors, accountant/auditor, city clerk, elections commission, and board of licenses. DLS or local users may have added additional accounts over the last two years for certain users for certain functions.

Why does DLS need local account administrators? As multiple departments in 352 cities and towns and over 100 districts begin to fully use the programs in DLS Gateway, additional users will ask to be authenticated as municipal employees and authorized to perform certain roles because of their responsibilities. Only a local official can realistically know who is currently working for the municipality and in what capacity.

What would a local account administrator need to do? The list of responsibilities is short and requires no special skills –

Use the Security module to add, update, or inactivate DLS Gateway accounts. Adding an account consists of creating a username, an initial password, and setting appropriate permissions. In pilot testing and regular usage, non-technical municipal staff persons have performed these tasks relying on simple documentation or intuitive logic. No special training is necessary. Updating consists of revising permissions as appropriate. Inactivating consists of clicking an Active checkbox.

Work with the city/town clerk or department staff to update entries in the Local Officials Directory. The Security module looks to the Local Officials Directory module to identify municipal employees for DLS Gateway accounts. City/town clerks can update employees in any department, while department employees typically have permission to update in their department. Local account administrators have permission, like city/town clerks, to update employees in any department. DLS staff attempt to keep listings for key officials up-to-date and make many changes as information happens to come their way. But information for many communities takes months or even years to filter into state agencies. Only local officials can reliably know on a current basis who has just been employed, who has changed jobs within the community, and who has retired or moved on.

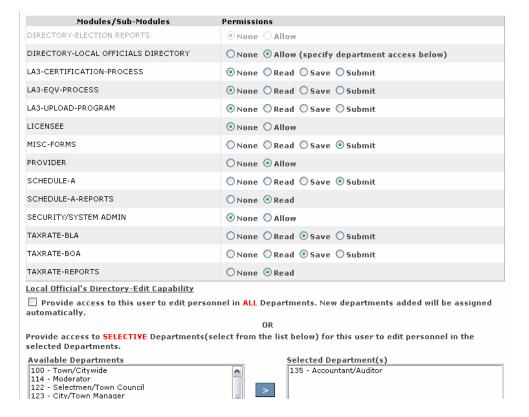
What is the most difficult responsibility? Setting appropriate permissions requires knowledge of department functions as they relate to state regulatory processes. Department employees know what they need, but the following screens summarize the typical settings for typical users. DLS Gateway's primary users, i.e. those who actually enter and submit data to the Department of Revenue, consist of assessors, accountant/auditors/finance directors/comptrollers, and those officials who submit so-called ALIF (license information) – city/town clerks, licensing boards, boards of health, and selectboards.

Typical Assessing Department Settings (where assessors are the final officials to check and submit tax rate "recap" data).

Modules/Sub-Modules	Permissions
DIRECTORY-ELECTION REPORTS	® None ○ Allow
DIRECTORY-LOCAL OFFICIALS DIRECTORY	O None O Allow (specify department access below)
LA3-CERTIFICATION-PROCESS	○ None ○ Read ○ Save ⊙ Submit
LA3-EQV-PROCESS	○ None ○ Read ○ Save ⊙ Submit
LA3-UPLOAD-PROGRAM	○ None ○ Read ○ Save ⊙ Submit
LICENSEE	● None ○ Allow
MISC-FORMS	○ None ○ Read ● Save ○ Submit
PROVIDER	● None ○ Allow
SCHEDULE-A	○ None
SCHEDULE-A-REPORTS	○ None
SECURITY/SYSTEM ADMIN	● None ○ Allow
TAXRATE-BLA	○ None ○ Read ○ Save ⊙ Submit
TAXRATE-BOA	○ None ○ Read ○ Save ⊙ Submit
TAXRATE-REPORTS	○ None ④ Read
Local Official's Directory-Edit Capability	
Provide access to this user to edit personnel in ALL Departments. New departments added will be assigned automatically.	
datamaticanyi	OR
Provide access to SELECTIVE Departments(select from the list below) for this user to edit personnel in the selected Departments.	
Available Departments	Selected Department(s)
100 - Town/Citywide 114 - Moderator	141 - Assessors
122 - Selectmen/Town Council	>
123 - City/Town Manager 129 - Other Executive	
135 - Accountant/Auditor	
145 - Treasurer 146 - Collector	
151 - Law Department Town/City Counsel	

Typical Accountant/Auditor/Finance Director/Comptroller Department Settings

(Substitute Finance Director or Comptroller for Accountant/Auditor in Directory-Edit Capability as appropriate.)



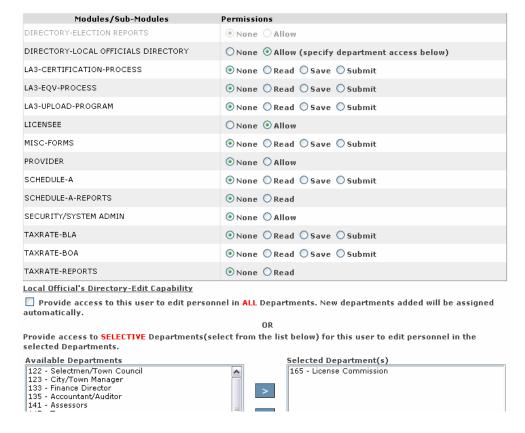
Typical City/Town Clerk Settings

Note Local Official's Directory Edit Capability is set to ALL departments.

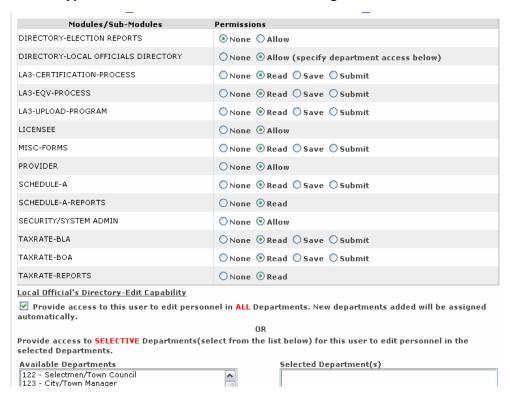
Modules/Sub-Modules	Permissions
DIRECTORY-ELECTION REPORTS	○ None
DIRECTORY-LOCAL OFFICIALS DIRECTORY	○ None
LA3-CERTIFICATION-PROCESS	○ None
LA3-EQV-PROCESS	○ None
LA3-UPLOAD-PROGRAM	○ None
LICENSEE	○ None
MISC-FORMS	○ None ○ Read ③ Save ○ Submit
PROVIDER	○ None
SCHEDULE-A	○ None
SCHEDULE-A-REPORTS	○ None ④ Read
SECURITY/SYSTEM ADMIN	○ None Allow
TAXRATE-BLA	○ None ○ Read ③ Save ○ Submit
TAXRATE-BOA	○ None ○ Read ③ Save ○ Submit
TAXRATE-REPORTS	○ None ④ Read
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	OR
Provide access to SELECTIVE Departments(select from the list below) for this user to edit personnel in the selected Departments.	
Available Departments	Selected Department(s)
122 - Selectmen/Town Council	<u>^</u>
123 - City/Town Manager 133 - Finance Director	
II	

Typical settings for department charged with submitting ALIF licensing information.

(Substitute License Commission for departments in Directory-Edit Capability as appropriate.)



Typical Local Account Administrator settings



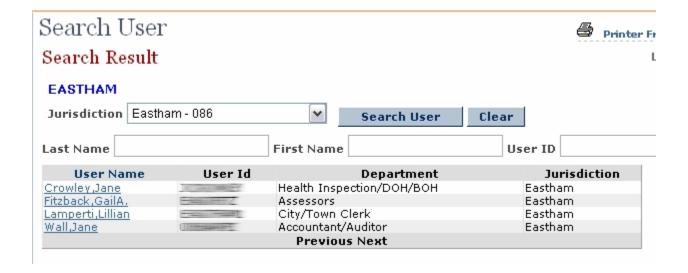
What about Lost or Forgotten Passwords?

Users can now reset their own passwords. If they forget their User Name, the system will refer them to you for assistance.

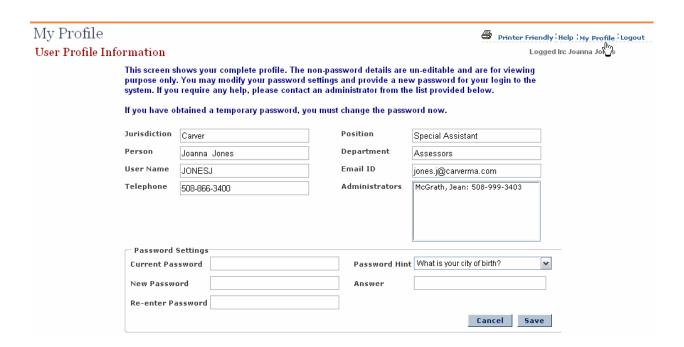




You would click on the Security tab and then on the *Search User* link. If they don't have an account, you would click on the *User Maintenance* link and select the user to add an account. If they have an account, it will show up in the resulting grid, as illustrated below:



If they forget their password, they click on the Forgot Password link on the main landing page. They are prompted for an answer to a hint, and a temporary password (one time use) is emailed to their address in the Local Officials Directory. They use the temporary password to log in and to reset their password after clicking on *My Profile* in the upper right corner of any DLS Gateway page.



On-line Security Help Information copied here as a further reference:

Security

Security allows local account administrators to

- 1. Create and manage User Names and passwords for their community's system users.
- 2. Set permissions for users relative to the functions their departments perform.
- 3. Inactivate users who have resigned, retired, or otherwise no longer need access.

SEARCH USER

If your community has a list of officials entered in the Local Officials Directory who also have login accounts, you can use the search function to find them by name or User Name. If they exist in the Local Officials Directory but do not have login accounts, find them first in User Maintenance (below) and then create an account.

SELECTION

Enter all or part of their name or User Name and click Search User. Click on the appropriate link under User Name. When the account settings appear, modify and save as appropriate.

USER MAINTENANCE - Login Modification

PERSON

A person is a local official entered in the Local Officials Directory for a specific local government function in a specific community. If a person performs two functions in the community, e.g. Collector and Treasurer, that person can have permissions set for each position or function under one user account, but the position title that corresponds to that account will appear on form signature lines. A person who performs services for more than one community must have a person entry for each community, with permissions set for the role they play in each.

USER NAME / PASSWORD

The User Name not case-sensitive. If the User Name is already in use, an alternative must be used. User Name's are specific to named individuals. The password should be a combination of letters and numbers, ideally random. Users can re-set their passwords using a password re-set program that will email a temporary password to their official email address.

ACTIVE

Users are not deleted from the database, because it is important to keep a permanent record of their activities, e.g. what they submitted, what they changed, etc. When a person is "deleted" from the Local Officials Directory or their account is "deleted" in DLS Gateway, their status changes from Active to Inactive. The effect is as if they were deleted, but a record of what they did remains.

ADA COMPLIANCE CHECK

Enables versions of internal DLS screens that are enhanced for the visually impaired. **Municipal users can ignore** this feature.

PERMISSIONS

The permissions currently set for this user are displayed and can be changed by a local security administrator.

None = No permission to see screens or information in this module or submodule. The module tab will not appear on the user's screen.

Allow = Permission for the functions allowed within separate modules (ALIF, APIF, Local Officials Directory)

Read = Permission to see but not add or change data in a module or submodule.

Save = Permission to Save information on a module or submodule form that can be submitted by others with Submit permission.

Sign-Only = Permission to sign a form but not to save or submit changes to the form. In development and not yet implemented.

Submit = Permission to submit a completed, signed form on behalf of the community.

Approve = DLS users only – Permission to approve a community submission. Approved forms are locked and can only be amended by an unapproval process.

DEPARTMENTS

Local Official's Directory-Edit Capability

Within the Directory module, a municipal user can have the ability to add/update/delete officials in all departments or in selected departments. To give the user rights to edit users in all departments, check the box so labeled. To allow the user to edit selected departments (beyond their own) highlight the departments in the Available Departments box and move them into the Selected Departments box with the > button.

SAVE

When satisfied with the permissions set for this user, click the **Save** button at the bottom of the form.